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ABSTRACT

This guide, prepared for the Delaware State Board of Education and the State Department of Public Instruction, is intended to assist individuals developing curricula to prepare students for entry-level positions in various banking and financial occupations. It is divided into three sections, each of which consists of a cross-referenced listing of job duties and occupational tasks. Section 1 is devoted to basic employability skills. Section 2 covers the job duties and tasks required in administrative support occupations (including executive secretaries). The third section covers the duties and tasks required of entry-level workers in occupations related to information services and systems (computer operator, computer programmer, and data entry operator). (MN)

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STATE TECHNICAL COMMITTEE REPORT

OCCUPATIONAL TASK ANALYSES

FOR

THE DEVELOPMENT OF BUSINESS EDUCATION MODEL CURRICULA

WITH EMPHASIS ON BANKING AND FINANCIAL OCCUPATIONS

OCTOBER, 1987

Sponsored by:
The State Board of Education
through the
Delaware Department of Public Instruction
Vocational Education Division
Dover, Delaware

In cooperation with
The State Council on Vocational Education

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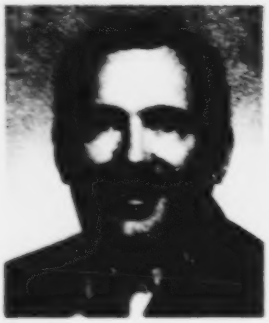

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INTRODUCTION

The demand for skilled office workers has never been brighter. Every recent prediction of future opportunities, particularly those of the banking institutions, includes statistics showing an increased need for workers in the "information era." The economic development of a State is dependent on how effectively its resources are used to provide a work force geared to meet the needs of business and industry. State and Local Education Agencies will continue to respond to this mandate through vocational education in preparing students for entry level positions as office workers. The Governor's Task Force Report on Vocational Education and the Carl Perkins Federal Vocational Education Act recognize the importance and encourage the utilization of business and industry representatives to assist educators in developing and improving vocational curricula.

To address this need, the Director of Vocational Education and State Supervisor of Business and Office Education, in consultation with the Business Industry Education Alliance (BIE) and Advisory Council on Career and Vocational Education, organized a State Technical Committee for Business and Office Education. The purpose of this Committee is to advise the State Board of Education and the State Department of Public Instruction on the development of a model curriculum which addresses financial and banking occupational training needs within the vocational area of Business and Office Occupations.

The ***Occupational Task Analyses for Basic Employability Skills, Administrative Support Occupations and Information Services and Systems*** are inventories of skills identified by the State Technical Committee for Business and Office Occupations and is designed to be used by local districts in developing model curricula to address labor market needs in Delaware. The task force members representing the banking industry emphasized the need for keyboarding, oral and written communication and math computation skills as essential for entry level positions i.e., Data Entry, Receptionist, and Accounting Clerk.

These entry level employees may be promoted to word processing and secretarial positions after demonstrating occupational competencies while participating in on-the-job experiences.

Technical assistance to local school districts for utilizing this material is available through the Vocational Division, State Department of Public Instruction.

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BUSINESS & OFFICE OCCUPATIONS

BASIC EMPLOYABILITY SKILLS

BASIC EMPLOYABILITY SKILLS

DUTIES	OCCUPATIONAL TASK ANALYSES	
The employee will be able to:		
A. Examine Own Employment Capabilities	A-1. Match interest and aptitudes for job area A-2. Verify abilities A-3. Identify immediate work goal	A-4. Match own availability and flexibility to job opening A-5. Develop career plan
B. Identify Employment Opportunities	B-1. Identify requirements for job B-2. Investigate occupational opportunities B-3. Identify resources for finding employment	B-4. Determine hiring practices and opportunities from employers B-5. Identify job trends
C. Apply Employment Seeking Skills	C-1. Locate job openings C-2. Prepare a resume and cover letter C-3. Complete application form C-4. Prepare for job interview C-5. Participate in interview C-6. Complete required tests	C-7. Write follow-up letter C-8. Evaluate job offer C-9. Write acceptance letter C-10. Evaluate job rejection C-11. Write response to job rejection if appropriate
D. Demonstrate Appropriate Work Behavior	D-1. Follow rules and regulations D-2. Complete assignments in accurate and timely manner D-3. Control emotions	D-4. Assume responsibility for own decisions and actions D-5. Exhibit pride and loyalty D-6. Recognize the importance of confidentiality D-7. Be trustworthy in all business dealings
E. Comply With Safety and Health Rules of Company	E-1. Learn safety rules and regulations of company E-2. Utilize equipment correctly E-3. Use appropriate action during emergencies E-4. Maintain clean and orderly work area	
F. Maintain Business-Like Image	F-1. Participate in company orientation F-2. Demonstrate knowledge of company products and services F-3. Exhibit positive behavior	F-4. Support and promote employer's image and purpose F-5. Dress appropriately for the company's image F-6. Be prepared to demonstrate procedures and assist others.
G. Maintain Working Relationships With Others	G-1. Work productively with others G-2. Show empathy, respect, and support of others G-3. Recognize, analyze and solve or refer problems	
H. Communicate Effectively In English	H-1. Read and comprehend written information H-2. Speak effectively with others	H-6. Use telephone etiquette H-7. Understand and follow written and oral directions

BASIC EMPLOYABILITY SKILLS

----------DUTIES----------	----------OCCUPATIONAL TASK ANALYSES----------	
The employee will be able to:		
	H-3. Use job-related terminology when appropriate H-4. Listen attentively H-5. Write legibly	H-8. Locate information needed to complete a task H-9. Prepare written communication demonstrating correct grammar and sentence structure and clarity
I. Adapt to Change	I-1. Recognize need to change and be flexible I-2. Demonstrate willingness to learn	I-3. Participate in continuing education I-4. View change as a positive work challenge
J. Understand How A Business Works	J-1. Recognize the role of business in the free enterprise system J-2. Identify general responsibilities of employees J-3. Identify general responsibilities of management/ employers	
K. Perform Math Skills	K-1. Apply math for problem solving K-2. Add whole numbers K-3. Subtract whole numbers K-4. Multiply whole numbers K-5. Divide whole numbers K-6. Add and subtract decimals	K-7. Add and subtract fractions K-8. Convert fractions to decimals K-9. Be familiar with metric measurement K-10. Convert decimals to fractions K-11. Convert weeks/days to hours K-12. Complete a time card K-13. Convert hourly wage to salary K-14. Process a W-2 form K-15. Process a W-4 form

***Basic Employability Skills are a vital component of vocational education programs and should be incorporated into each occupational task list.**

BUSINESS & OFFICE OCCUPATIONS

ADMINISTRATIVE SUPPORT OCCUPATIONS

****

- EXECUTIVE SECRETARY

ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Executive Secretary**

----------DUTIES----------	----------OCCUPATIONAL TASK ANALYSES----------	
The employee will be able to:		
A. Manage Time And Resources	A-1. Establish individual goals, and objectives (E,R,A)	A-9. Maintain schedules (E,R,A)
	A-2. Establish work-related goals and objectives (E,R,A)	A-10. Inform participants of established schedules (dates, rooms, times, etc.) (E,R,A)
	A-3. Plan and prioritize daily activities and work schedules (E,R,A)	A-11. Establish follow-up procedures for overall operations (E,R,A)
	A-4. Coordinate work schedule with other personnel (R,A)	A-12. Plan for future projects (E,R,A)
	A-5. Gather data and materials required to complete tasks (E,R,A)	A-13. Identify long and short-term deadlines (E,R,A)
	A-6. Coordinate use of resources (R,A)	A-14. Identify need for additional resources (R,A)
	A-7. Adjust individual plans in response to changing conditions in work load or resource availability (R,A)	A-15. Coordinate travel arrangements (E,R,A)
	A-8. Coordinate schedules of internal/external personnel (R,A)	A-16. Revise schedules of internal/external personnel due to unexpected changes (R,A)
		A-17. Meet established deadlines (E,R,A)
		A-18. Provide direction for assigned personnel (A)
B. Present A Positive Image	B-1. Greet the public (E,R,A)	B-4. Assist with orientation of new employees (R,A)
	B-2. Provide information requested by the public (E,R,A)	B-5. Contribute to team effort (E,R,A)
	B-3. Interact positively with co-workers (E,R,A)	B-6. Represent the organization in various capacities (E,R,A)
		B-7. Produce high quality work (E,R,A)
C. Manage Information	C-1. Organize paper/traditional filing system (E,R,A)	C-9. Disseminate information through the proper channels (R,A)
	C-2. Organize electronic filing system (R,A)	C-10. Use information to create reports, correspondence, recommendations, minutes, etc. (R,A)
	C-3. Maintain filing systems (E,R,A)	C-11. Research information from internal/external sources (R,A)
	C-4. Retrieve information from various filing systems (E,R,A)	C-12. Control distribution of information (Confidentiality) (E,R,A)
	C-5. Maintain personnel records (R,A)	
	C-6. Maintain financial records (R,A)	
	C-7. Maintain DATA records (E,R,A)	
	C-8. Prepare information for internal/external distribution (E,R,A)	

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement

ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Executive Secretary**

----------DUTIES----------	----------OCCUPATIONAL TASK ANALYSES----------	
The employee will be able to:		
D. Communicate With Others	D-1. Follow instructions and directions to complete tasks (E,R,A) D-2. Give verbal directions and instructions clearly (E,R,A) D-3. Give written directions and instructions clearly (E,R,A) D-4. Obtain information to clarify your interpretation of the task (E,R,A) D-5. Seek directions when unsure of task (E,R,A)	D-6. Interpret body language (E,R,A) D-7. Utilize non-verbal actions (R,A) D-8. Practice effective/courteous telephone technique (E,R,A) D-9. Screen phone calls (E,R,A) D-10. Compose written documents (R,A) D-11. Interpret written and oral communications (E,R,A)
E. Make Decisions	E-1. Evaluate information (E,R,A) E-2. Weigh alternatives (E,R,A) E-3. Operate within limits of responsibility (E,R,A) E-4. Accept responsibility and risk for decisions made (E,R,A)	E-5. Provide justification for decisions made (E,R,A) E-6. Carry out decisions made (E,R,A) E-7. Inform others of decisions made (E,R,A) E-8. Evaluate outcome of decisions made (E,R,A)
F. Adapt To New Technology	F-1. Keep up-to-date with new technology (R,A) F-2. Use available manuals for self-instruction (E,R,A) F-3. Adapt/apply basic knowledge to specific job situations (E,R,A)	F-4. Define and document operational procedures (E,R,A) F-5. Identify potential problems and ways to correct, avoid them (R,A) F-6. Utilize help lines (E,R,A)
G. Improve Work Efficiency	G-1. Meet and strive to exceed established standards (E,R,A) G-2. Identify new methods for accomplishing tasks (R,A) G-3. Streamline procedures (R,A) G-4. Proofread written materials (E,R,A)	G-5. Recognize and correct mistakes (E,R,A) G-6. Incorporate corrections and feedback into future work performance (E,R,A) G-7. Achieve a balance between quality and quantity of work produced (E,R,A) G-8. Assess aptitudes and compatibility for working with new technology (R,A)

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement

ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Executive Secretary**

----------DUTIES----------	----------OCCUPATIONAL TASK ANALYSES----------	
The employee will be able to:		
H. Operate And Maintain Office Equipment	H-1. Maintain equipment inventory (E,R,A) H-2. Interpret operating manuals (E,R,A) H-3. Instruct co-workers in proper use of equipment (E,R,A) H-4. Inventory supplies for equipment (E,R,A) H-5. Monitor usage of supplies (E,R,A)	H-6. Order supplies (E,R,A) H-7. Review storage capacity (E,R,A) H-8. Perform basic maintenance tasks (E,R,A) H-9. Secure service maintenance (R,A) H-10. Document service response time (E,R,A) H-11. Generate feedback on performance of equipment (E,R,A)
I. Perform Word Processing Functions	I-1. Apply basic word processing concepts to various systems (E,R,A) I-2. Interpret operating manuals (E,R,A) I-3. Utilize help lines (E,R,A) I-4. Use word processing terminology (E,R,A) I-5. Organize electronic filing system (R,A) I-6. Define and document operational procedures (R,A) I-7. Review storage capacity (E,R,A) I-8. Maintain daily job log (E,R,A) I-9. Maximize program functions based on identified/ potential user needs (E,R,A) I-10. Format documents (E,R,A)	I-11. Compose, store, edit, revise documents (E,R,A) I-12. Transcribe and dictation (E,R,A) I-13. Use reference materials (dictionary, thesaurus, spelling, word books, etc.) (E,R,A) I-14. Proofread documents (E,R,A) I-15. Create and maintain back-up systems (E,R,A) I-16. Retrieve information from electronic files (E,R,A) I-17. Instruct back-up operator (R,A) I-18. Inventory supplies (E,R,A) I-19. Update electronic data files (E,R,A) I-20. Perform basic maintenance tasks (E,R,A)

LEVEL OF TASKS
E = Entry
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A = Advancement

BUSINESS & OFFICE OCCUPATIONS

INFORMATION SERVICES AND SYSTEMS

****

- COMPUTER OPERATOR
- COMPUTER PROGRAMMER
- DATA ENTRY OPERATOR

ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Computer Operator**
- **Computer Programmer (Trainee)**

----------DUTIES---------- **----------OCCUPATIONAL TASK ANALYSES----------**

The employee will be able to:

A. Write And Maintain Programs

A-1. Determine the program's purpose (E,R,A)
A-2. Determine the program flow (E,R,A)
A-3. Spec-out a program for others (R,A)
A-4. Determine the source of data (R,A)
A-5. Determine appropriate language (R,A)
A-6. Determine the best hardware (R,A)
A-7. Design output format (R,A)
A-8. Code the program (E,R,A)
A-9. Compile program (E,R,A)
A-10. Test and de-bug program (E,R,A)
A-11. Prepare program documentation (E,R,A)
A-12. Implement the program (R,A)
A-13. Write procedures for software (E,R,A)
A-14. Get user approval (A)
A-15. Update the code (E,R,A)
A-16. Keep abreast of new technology (E,R,A)

B. Operate The Equipment

B-1. Power up/power down peripherals (E)
B-2. Load input/output devices (E)
B-3. Load software (E)
B-4. Operate auxiliary equipment (E)
B-5. Monitor peripheral equipment operation (E,R)
B-6. File and pull tapes/disks (R)
B-7. Set up special forms (R)
B-8. Break down output (E)
B-9. Deliver output (E)
B-10. Ensure adequate inventory (E)
B-11. Order supplies (R,A)
B-12. Clean equipment (E)
B-13. Test equipment (R,A)
B-14. Start up/shut down system (R,A)
B-15. Sign onto system (E)
B-16. Access the system (E)
B-17. Use keyboard to interact with the system (E)
B-18. Write data entry format programs (R)
B-19. Satisfy hardware requests (E,R)
B-20. Determine nature of problem (R,A)
B-21. Fix recoverable problems (R,A)
B-22. Request help as needed (R,A)
B-23. Maintain security of hardware/software (E,R,A)
B-24. Participate in training (E,R,A)
B-25. Monitor environmental equipment (E,R,A)

C. Monitor System Resources

C-1. Monitor on-line resources (R,A)
C-2. Monitor software messages (E,R,A)
C-3. Respond to hardware messages (E,R,A)
C-4. Respond to software messages (E,R,A)
C-5. Keep log of system performance (R,A)
C-6. Run diagnostics (R, A)
C-7. Recommend replacement for old equipment (R,A)

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement

ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Computer Operator**
- **Computer Programmer (Trainee)**

----------DUTIES----------	----------OCCUPATIONAL TASK ANALYSES----------	
The employee will be able to:		
D. Keep Track Of Various Jobs	D-1. Monitor system console for hardware request (R,A) D-2. Monitor system console for job flow (R,A) D-3. Use monitoring programs (R,A) D-4. Prioritize work flow (R,A) D-5. Schedule and monitor production jobs (R,A)	D-6. Ensure programs run correctly (R,A) D-7. Check printed output (E,R,A) D-8. Maintain written logs (E,R,A) D-9. Monitor performance of others (A) D-10. Keep track of deleted material (A)
E. Satisfy User Requests	E-1. Resolve on-line problems (R,A) E-2. Remain on customer schedule (E,R,A) E-3. Schedule special requests (R,A) E-4. Start jobs (E,R) E-5. Define user problems (R,A)	E-6. Present solutions to user's problems (R,A) E-7. Respond in timely fashion to request (R,A) E-8. Train users in software use (A) E-9. Write user guides (A) E-10. Explain terminology (R,A) E-11. Deliver data (E,R,A)
F. Manage Data	F-1. Enter data accurately (E,R,A) F-2. Verify data (R,A) F-3. Use programs to manipulate data (E,R,A) F-4. Back-up data (R,A)	F-5. Convert data to different formats (A) F-6. Move data to storage (E,R,A) F-7. Secure data (E,R,A) F-8. Update media library (R,A) F-9. Maintain confidentiality of data (E,R,A)
G. Communicate With Others	G-1. Communicate ideas verbally (E,R,A) G-2. Listen to identify user needs (E,R,A) G-3. Report problems (E,R,A) G-4. Write reports (R,A) G-5. Give positive feedback (E,R,A) G-6. Keep co-workers informed of daily status (E,R,A)	G-7. Report activities to management (R,A) G-8. Provide assistance for problem-solving (R,A) G-9. Complete forms (E,R,A) G-10. Write documentation (R,A) G-11. Make presentations (A)

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement

ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Computer Operator**
- **Computer Programmer (Trainee)**

----------DUTIES----------	----------OCCUPATIONAL TASK ANALYSES----------	
The employee will be able to:		
H. Train Co-Workers	H-1. Explain job description (R,A) H-2. Explain job related terminology (R,A) H-3. Identify sources of documentation (R,A) H-4. Explain hardware features (R,A) H-5. Explain software features (R,A) H-6. Explain special keyboard functions (R,A) H-7. Explain production schedule (R,A) H-8. Explain new jobs (R,A)	H-9. Explain job execution requirements (R,A) H-10. Explain how to set up special forms (R,A) H-11. Explain operating procedures (R,A) H-12. Explain how to recognize problems (R,A) H-13. Share tricks of the trade (R,A) H-14. Familiarize new employees with recovery procedures (R,A) H-15. Familiarize new employees with emergency procedures (R,A)
I. Maintain Procedures	I-1. Follow verbal instructions (E,R,A) I-2. Read and interpret manuals (E,R,A) I-3. Identify need for manuals (E,R,A) I-4. Update manuals and procedures (R,A)	I-5. Recommend changes (E,R,A) I-6. Maintain personal notes (E,R,A) I-7. Follow documentation (E,R,A) I-8. Enforce procedures (A)

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement

ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Data Entry Operator**

DUTIES	OCCUPATIONAL TASK ANALYSES	
The employee will be able to:		
A. Perform Data Control Functions	A-1. Schedule jobs (A) A-2. Prepare job instructions for key operator (A) A-3. Prepare documents and batch tickets for data entry (E,R,A) A-4. Code data (E,R,A) A-5. Maintain integrity and confidentiality of data (E,R,A)	A-6. Copy data (E,R,A) A-7. Prepare keyed job documents for supervisor (E,R,A) A-8. Recover data (E,R,A) A-9. Perform emergency shutdown procedures (R,A) A-10. Monitor disk usage (R,A) A-11. Prepare backup files (E,R,A)
B. Enter and Verify Data	B-1. Organize work station (E,R,A) B-2. Enter data from source documents (with or without program control) (E,R,A) B-3. Add new records (E,R,A) B-4. Modify records (E,R,A)	B-5. Analyze data (A) B-6. Verify data (A) B-7. Search tapes, disks, or diskette for information (R,A) B-8. Transmit data (R,A) B-9. Terminate operation (E,R,A)
C. Operate Office Equipment	C-1. Operate electronic calculators (E,R,A) C-2. Operate typewriters (E,R,A) C-3. Operate ten-key adding machine (E,R,A)	
D. Operate Data Entry Equipment	D-1. Operate on-line CRT terminals (E,R,A) D-2. Operate key to floppy disk equipment (E,R,A) D-3. Operate key to hard disk equipment (E,R,A) D-4. Operate key to magnetic tape equipment (E,R,A)	D-5. Operate verifiers (E,R,A) D-6. Perform operator maintenance on verifiers (R,A) D-7. Prepare printouts using a printer (E,R,A)
E. Perform Clerical And Maintenance Duties	E-1. Receive telephone calls (E,R,A) E-2. Place telephone calls (E,R,A) E-3. File program cards (E,R,A) E-4. Organize file of job instructions (E,R,A)	E-8. Store data entry supplies (E,R,A) E-9. Inventory data entry supplies (E,R,A) E-10. Identify data entry equipment malfunction (R,A)

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement

ADMINISTRATIVE SUPPORT OCCUPATIONS

- **Data Entry Operator**

DUTIES	OCCUPATIONAL TASK ANALYSES	
The employee will be able to:		
	E-5. Prepare worker production log (E,R,A) E-6. File reusable tapes, disks or diskettes (E,R,A) E-7. Assist with on-the-job training (A)	E-11. Remove and repunches jammed cards (keypunch) (E,R,A) E-12. Inspect disks or diskettes for damage (E,R,A) E-13. Restore disk data files (R,A)
F. Manage Data	F-1. Enter data accurately (E,R,A) F-2. Verify data (E,R,A) F-3. Use programs to manipulate data (R,A) F-4. Back-up data (R,A)	F-5. Convert data to different formats (A) F-6. Move data to storage (E,R,A) F-7. Secure data (E,R,A) F-8. Update media library (R,A) F-9. Maintain confidentiality of data (E,R,A)
G. Communicate With Others	G-1. Communicate ideas orally (E,R,A) G-2. Listen to identify user needs (A) G-3. Report problems (E,R,A) G-4. Write reports (A) G-5. Give positive feedback (R,A)	G-6. Keep co-workers informed of daily status (A) G-7. Report activities to management (R,A) G-8. Provide assistance for problem-solving (R,A) G-9. Complete forms (E,R,A) G-10. Write documentation (A) G-11. Make presentations (A)
H. Train Co-Workers	H-1. Explain job description (A) H-2. Explain terminology (A) H-3. Identify sources of documentation (A) H-4. Explain hardware features (A) H-5. Explain software features (A)	H-6. Explain special keyboard functions (A) H-7. Explain new jobs (A) H-8. Explain how to set up special forms (A) H-9. Explain operating procedures (A) H-10. Share tricks of the trade (A) H-11. Familiarize new employees with emergency procedures (E,R,A)
I. Maintain Procedures	I-1. Follow verbal instructions (R,A) I-2. Read and interpret manuals (R,A) I-3. Identify need for manuals (A) I-4. Update manuals and procedures (A)	I-5. Recommend changes (A) I-6. Maintain personal notes (A) I-7. Follow documentation (E,R,A) I-8. Enforce procedures (R,A)

LEVEL OF TASKS
E = Entry
R = Retention
A = Advancement